

COUNTY OF SAN DIEGO, CALIFORNIA
BOARD OF SUPERVISORS POLICY

Subject

Housing Affordable to Elderly Households

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Purpose

The purpose of this policy is to set guidelines for the implementation of Section 4120 of the San Diego County Zoning Ordinance regarding affordable housing for the elderly.

Background

The Board of Supervisors recognizes that current costs of land and financing make it difficult for the private sector to build housing affordable to elderly households. Therefore, Section 4120 of the Zoning Ordinance was adopted to authorize density bonuses in designated areas of the Land Use Element of the General Plan for projects which provide housing for very low-income elderly households under certain conditions.

Policy

It is the policy of the Board of Supervisors that density bonuses may be permitted in areas specified by the General Plan when they provide housing that is affordable to very low-income elderly households.

Program

A. Definitions:

The following definitions will be used for projects processed pursuant to this policy:

Elderly Households - Occupancy by a person or family as defined by United States Department of Housing and Urban Development (HUD).

Very Low-Income Household - Total gross household income that is no greater than 50% of the Regional Median Income.

Affordable Rent - Determined by County Department of Housing and Community Development based on the HUD affordable rental rates (HUD adjusts rental rates on an annual basis) for households at or below 50% of the regional median income, adjusted to the size and amount of bedrooms contained within the dwelling unit.

Reserved Unit - A dwelling unit set aside for rental to a very low-income household.

Regional Median Income - The latest Regional Median Income as determined by the U.S. Department of Housing and Urban Development for San Diego Standard Metropolitan Statistical Area (SMSA) as adjusted for family size.

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B. Density Bonus Guidelines:

The amount of the density bonus (i.e., dwelling units allowed in addition to the total number permitted by right by the Zoning Ordinance) will depend on current conditions associated with the specific proposal and will be negotiated on a case-by-case basis. The following guidelines shall be considered:

1. The project is located in areas planned and/or zoned for multi-family densities in Current Urban Development Areas of the General Plan with maximum densities of 10.9 dwelling units per acre or higher.
2. A project located in a specific plan area shall not be allowed a density bonus which causes the overall maximum density of the specific plan area to be exceeded.
3. The type and density of the project would not have a harmful adverse effect on surrounding neighborhood character.
4. The site is physically suitable for the density of development proposed.
5. There is demonstrated capacity and service of sewer, water, schools (as may be required), fire, police protection and utilities available to the project.
6. The project and surrounding area have adequate access to accommodate the generation of traffic.
7. The site has reasonable proximity and access to special support services (i.e., retail and convenience uses, public transit, emergency medical facilities, etc.) as may be required by the type and density of development proposed.

C. Density Bonus Limits:

The following density bonus options are available to development proposals under this policy provided all units are restricted to elderly households as defined herein, and all reserved units are subject to affordable rent, occupancy and eligibility restrictions as defined herein.

1. Density Bonus Option Allowed by Major Use Permit:

- a. For projects located in areas with General Plan designations of Residential 9 (43 du/ac) with zoning of 29 du/ac, Residential 10 (24 du/ac), Office Professional Commercial 11 (variable) a maximum density up to forty-five (45) dwelling units per acre may be approved for rent or occupancy by elderly households by major use permit pursuant to Section 7350 of the Zoning Ordinance.

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b. For projects located in areas designated Residential 7 (10.9 du/ac) and Residential 8 (14.5 du/ac) a maximum one hundred percent (100%) density bonus may be approved for rent or occupancy by elderly households by Major Use Permit.

c. For projects located in areas designated Residential 7 (10.9 du/ac) and Residential 8 (14.5 du/ac) a maximum of one hundred fifty percent (150%) density bonus may be approved for rent or occupancy by elderly households by Major Use Permit, provided that a threshold decision has been made by the Director of the Department of Planning and Land Use and the applicable Community Planning or Sponsor Group that the proposed project is eligible for processing. The threshold decision shall be made pursuant to the same procedure and is subject to the same fee as specified in Board of Supervisors Policy I-101, Threshold Decision Procedure for a Major Use Permit to be Submitted Pursuant to Regional Land Use Element Policy 3.8. If either the Director or the Planning/Sponsor Group finds that the project should not be authorized for processing, such determination shall automatically be reviewed by the Board of Supervisors pursuant to said Policy I-101.

The threshold decision shall be guided by whether or not a positive finding can be made relative to each of the following criteria:

1. The project is not within an area that is under active consideration for incorporation or annexation.
2. The project will have adequate public services available to serve the proposed increased density and intensity of use.
3. Medical, shopping and public transportation services are available within a reasonable distance of the project site.
4. The proposed bulk, height and density of the project can be compatibly related to surrounding development and will not be out of character with the neighborhood.

D. Reserved Unit Criteria:

1. Number of Reserved Units

a. For projects proposing all rental units:

35% of all units in the project shall be reserved for rentals to elderly households with an income no greater than 50% of the Regional Median Income, at affordable rents as defined herein. The remaining dwelling units in the project may be rented to elderly households at fair market rates with no limitations.

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b. For projects proposing mixed sale-rental dwelling units:

33% of all dwelling units in the project shall be reserved for rentals to elderly households with an income no greater than 50% of the Regional Median Income, at affordable rents as defined herein.

The remaining dwelling units in the project may be for sale or rent to elderly households at fair market rates with no limitations.

c. The rental conditions for each project shall be set forth in a contractual agreement between the developer and the County or other private contractual arrangements that provide legal assurances that the provisions of this policy shall be met.

This contractual agreement with the County shall be complied with to the satisfaction of the San Diego County Department of Housing and Community Development.

2. Term of Reserved Units:

The reserved units shall be reserved for a period of thirty (30) years with tenant turnovers converting to market rate units after 30 years.

E. Project Evaluation Criteria:

The purpose of project evaluation criteria is to help evaluate proposed locations for senior citizen housing projects. These guidelines should be used by staff, the general public and decision makers when preparing or reviewing plans for senior citizen housing developments under the County's major use permit process.

Project Evaluation Criteria for Senior Citizen Housing Developments		Points
Professional Services (Health Care) Hospital	(within 1/2 mile)	5
Hospital and/or Outpatient Services	(within 3 miles)	5
Comprehensive Medical Services	(within 3 miles)	4
(doctors, dentists, etc.)	(within 5 miles)	3
Fire Department	(within 5 miles)	2

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Ambulance and/or Paramedic Services	(within 1/2 mile)	2
Ambulance and/or Paramedic Services	(within 5 mile)	1
Clinics and Other Social Services/facilities rendering care to elderly or patronized by seniors	(within 1/2 mile)	2
	(within 5 mile)	1
	Maximum points possible	20
Shopping		
Regional Shopping Center	(within 1/2 mile)	5
Strip Shopping	(within 3 blocks)	3
Neighborhood Shopping	(within 3 blocks)	2
	Maximum points possible	= (10)
Public Transportation		
Bus or Transit Service	within 2 blocks or directly served	5
Bus or Transit Service	(within 1/2 mile)	2
Senior Citizen's Special Transportation (i.e., van service or Dial-A-Ride)		
	Maximum points possible	= (8)
Recreational/Cultural/Special Services		
Neighborhood Park/Recreational facilities	(within 2 blocks)	4
Neighborhood Park/Recreational facilities	(within 1/2 mile)	3
Senior Citizen's Center	(within 2 blocks)	5
Senior Citizen's Center	(within 1 mile)	4

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Community Services - Social/education/religious		(within 1/2 mile)	3	
Community Services - Social/education/religious		(within 2 miles)	2	
		Maximum points possible =	(12)	
On Site-Facilities Proposed				
Recreation				
Active				
	Pool		2	
	+ Spa		+1	
	Tennis		2	
	+ Other Courts		+1	
	Recreation Building (kitchen, bedroom, conference room)		4	
	Resident Garden		2	
	Lawn Area for Recreation, etc.		2	
	Pedestrian and Bicycle Paths		2	
Passive				
	Patio shared		2	
	Patios and Balconies, private		2	
	Landscaped and Garden Areas		2	
Other Facilities				
	Laundry within Unit		2	
	Elevator (if not required by UBC)		5	
	Security Measures (indoor-outdoor)		3	
	On-Site Manager		3	
		Maximum points possible =	(35)	

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Parking Requirements - (variable)			
	1 or more parking spaces for each dwelling unit, regardless of size		5
	Guest parking		3
	Close and easy building access (handicapped spaces close to building); not to dominate views or main entries; small cluster lots preferable to large lots of individual unit parking desirable; lighting		2
		Maximum points possible	(10)

Site Consideration

Utilities and Services - immediate proximity and availability (Gas, Electricity, Sewer, Water, Fire)

Land Characteristics - topography, surface drainage, easements, access

Environmental Concerns - noise pollution, flooding potential, air pollution, environmental damage, etc.

	No major or minor problems	5						
	1 - 2 major/minor problems	3						
	3 - 4 major/minor problems	1						
						Maximum points possible =	(5)	
						Total points possible =	(100)	
	Extra Bonus Points for:							
	Percentage of units for low-income households						2	

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	Percentage of units for handicapped (beyond State Building Code Title 24 requirements)							2
	Reduction of non-renewable energy usage either through application of alternative energy systems or through committed energy conservation measures beyond those normally required by law							1
	Location in an area zoned for high density							Density du/ac
						43.0		5
						29.0		3
						24.0		2
						14.5		1
						10.9		0
						Maximum points possible -		(10)

Rating Scale:

Scale: Superior project/location 91-100

Above average project/location 81-90

Average project/location 71-80

F. Site Development Standards:

Site development standards are provided to assure that an appropriate design is established which will enhance the lives of senior citizens. These guidelines promote and provide for independent living and have a range of amenities for the widely varied needs and abilities of the residents.

As a person ages, certain design elements become increasingly important, such as those that contribute to comfort, safety and security, ease of access and socializing. The site development standards are established to facilitate rich social and recreational experiences, personal growth and challenge among older people with different ability levels (and all other age groups and life styles). These standards are necessary and useful for making decisions regarding facility provisions and prioritizing development alternatives.

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1. Site Development Plan: Development Standards for Senior Housing

A. Site Planning Elements

1. Site Utilization: Site utilization shall be approximately as follows:

building footprint: 30%

parking and paved areas: 24%

maximum landscape setbacks

and other recreational areas: 46%

2. Parking: Parking spaces shall be provided and maintained on-site at a minimum ratio of one space per dwelling unit, plus appropriate handicapped spaces with immediate and easy access to the handicapped units. The parking lot shall be punctuated periodically by landscaped strips between stalls. Ramped access with handrails shall be used on sloped access to and from the parking lot when appropriate. A drop off area shall be provided where parking is not near units. Shuttle services are encouraged.

3. Open Space and Recreation: The following active and passive recreational features may be provided and maintained:

a. either/or a pool (standard or lap), therapy spa, barbecue area in a common area - covered outdoor seating area.

b. a master recreation room on the ground floor with kitchen facilities and/or necessary facilities if adult day care is proposed use.

c. centrally located laundry room(s) with interior seating and low level tables for folding clothes.

d. a private usable feel safe balcony with ledge for plants or a graded patio with each unit.

e. natural passive area with wide walk-ways.

f. garden space with irrigation.

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g. contiguous senior housing developments shall have areas of shared and open space between developments to encourage social interaction and to beautify and create desirable living atmosphere.

h. backed benches in shared paved areas.

i. small grass cluster areas with views.

4. Building Style: A definite unified architectural style, light and complementary building coloration, amplified entryways, wood trims, materials typically found in the residential buildings of the surrounding neighborhood, covered entries for all units to protect against inclement weather.

a. screen doors for each unit

b. peep holes in entry doors

c. adequate cross-ventilation

d. panic buttons to manager's unit

e. landscaped views

f. windows placed to provide total natural daytime lighting - window height 3-1/2 feet maximum

5. Number, Height and Type of Units:

a. limited number of stories (two if possible depending on bulk and density)

b. provisions for handicapped tenants as per County of San Diego standards and building code requirements

c. encouragement of shared housing, suite concept, studio and single-bedroom apartments

6. Bulk Control: Shadow relief and bulk control will be maintained through use of the following:

a. extended balconies

b. wood trim elements

c. staggered unit facades

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7. Multiple Entries: Buildings may have multiple entries distinguished by decorative treatment. All building sides may be treated with decorative elements to appear as multiple fronts rather than unadorned backs.

8. Stairs: Where changes in grade are necessary, both ramps and stairs must be provided. Whenever possible, changes in grade that require ramps and stairs should be avoided, especially in building entry and drop-off areas. Those who have walkers and canes have a special need for stair design:

- a. Low-level lighting should illuminate the top and bottom of steps and ramps.
- b. Low-level lighting directed toward the stair riser and illuminating the tread increases safety.
- c. Gradual slow riser placement with a rest area between floors, on staircase.

B. Landscaping Amenities: Plantings shall be clustered in informal arrangements to provide building enhancement, perimeter buffering and parking area relief. Landscaping shall utilize passive and active areas of recreation for a hierarchy of use for senior citizen needs such as the following, but not limited to:

- a. seating in shade and sun
- b. streetscaping with planted setbacks and trees
- c. security lighting
- d. paved access
- e. plants for seasonal interest
- f. drinking fountains
- g. use of grass in lieu of ground cover whenever possible
- h. use of crib retaining walls
- i. plant and walk-way lighting

G. Location of Reserved Units in the Coastal Zone

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Two or more residential developments (whether owned by the same or different persons) located in the Coastal Zone as delineated in Division 20 of the Public Resources Code may be treated as a single project for purposes of this policy and shall be subject to the locational provisions of Section 65590 of the Government Code. The reserved dwelling units may be distributed in any combination among the residential developments, provided that:

- a. The permit approving the increased density specifies the distribution of the reserved dwelling units.
- b. The density at any site shall not exceed the maximum permitted with the increased density.
- c. Final construction approval for all dwelling units at all sites shall be subject to completion of the reserved dwelling units as provided in subsection H below.

H. Construction Schedule

The reserved dwelling units shall be constructed concurrently with, or in advance of, the non-reserved dwelling units in a residential development. The officer or body approving the permit for the increased density may specify a schedule for the completion of the reserved dwelling units. In no event, however, should final construction approval be given for more than 75% of the non-reserved units until all reserved dwelling units have received final construction approval.

Sunset Date

This policy will be reviewed for continuance by 12-31-2003.

Board Action

12-19-79 (30)

5-19-82 (26)

7-3-85 (35)

8-20-86 (11)

7-26-88 (43)

12-12-89 (49)

6-5-90 (43)

9-25-90 (41)

7-14-99 (4)

CAO Reference

1.Department of Planning and Land Use

2.Department of Housing and Community Development